SOPHTLOGIC

System Administration Privileges 2010

User Manual

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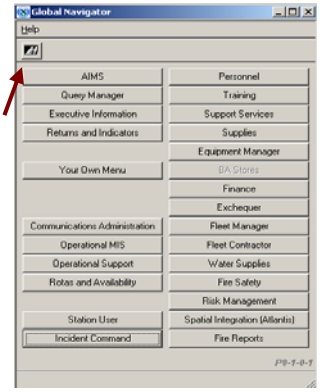
Users Setup

This manual explains how to Efficiently Manage Access to the Sophtlogic pharOs system in order to maintain the highest level of Data Integrity and conform to the Data Protection Act. Generally, **Post Codes** (**recommended**) are used as the **User Name** for the system. This means that if a person moves into an existing Post the Privileges for that Post will have already been set up and all that needs to be changed is the Passwords. You can have a person in a certain post and give extra Privileges by using the '**Users**' option instead of the '**Profiles**' option, otherwise, you would have to set up all the Privileges to each individual User each time someone Joins and Leaves the Post – very time consuming; especially if you have a high turn over, and it is very easy to mistakenly give the wrong Privileges to a User. By setting up the Privileges to the **Post Code**; as this only has to be done once, and move the person in and out of the Post, fewer mistakes will occur.

Setting Up a New User Post Code

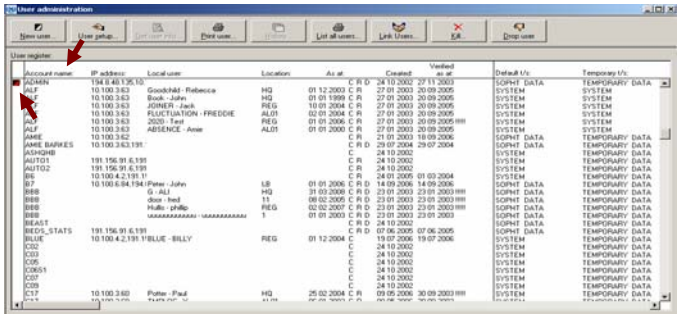
As a Database Administrator (DBA) you will be able to set up a New User/Post Codes, Allocate / Change Offices/Departments and set up the Privileges to the Users Post Code.

At the top of the Global Navigator menu press the User Administration button - this is a 'two faces' icon



- Click onto the Two faced icon

The User Administration window will open



I will explain what each icon does within the toolbar as we go along…. page 5

- You can click onto the colunm heading to order the list
  - If there is more than one person in a Post then the Account may appear more than once
  - Account Name is the Oracle Account name that is assigned to a User (Post Name)
- On the left-hand side, pictures will be shown to indicate who is logged in at the moment:

means that the user has one session open

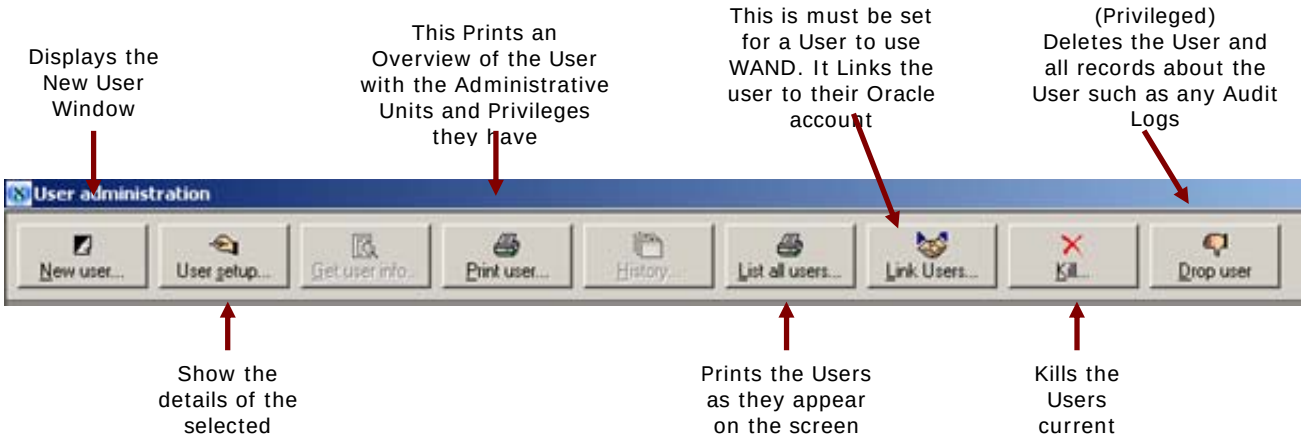
means that the user has more than one session open

User register:

Account name:	IP address:	Local user:	Location:	As at:	Created:	Verified as at:	Default t/s:	Temporary t/s:
ADMIN	194.8.48.135,10.			C R D	24 10 2002	27 11 2003	SOPHT_DATA	TEMPORARY_DATA
ALF	10.100.3.63	Goodchild - Rebecca	HQ	01 12 2003 C R	27 01 2003	20 09 2005	SYSTEM	SYSTEM
ALF	10.100.3.63	Book - John	HQ	01 01 1999 C R	27 01 2003	20 09 2005	SYSTEM	SYSTEM
ALF	10.100.3.63	JOINER - Jack	REG	10 01 2004 C R	27 01 2003	20 09 2005	SYSTEM	SYSTEM

Heading	Description
Account name	User name (Post Code)
IP address	IP Address of local machine where this account last connected
Local user	If this account is for an occupied post then this will show the name of the person currently in this post
Location	Location of person
As at	Date this person started their current post
C	**Connect** – allows the user to have access to the database. Should always be set to **Yes**
R	**Resource** – allows the user to use database resources. Should always be set to **Yes**
D	**DBA** – explained below
Created	Date account created
Verified as at	Date password last changed
Default tablespace	Should always be set to **USER_DATA** – if not then you may experience errors when creating the account
Temp tablespace	In previous versions of Oracle it was possible to specify the temp tablespace, but it now must be set to **TEMPORARY_DATA**

User Administration Toolbar


Displays the New User Window
This Prints an Overview of the User with the Administrative Units and Privileges they have
This is must be set for a User to use WAND. It Links the user to their Oracle account
(Privileged) Deletes the User and all records about the User such as any Audit Logs
User administration
New user...
User setup...
Get user info...
Print user...
History...
List all users...
Link Users...
Kill...
Drop user
Show the details of the selected
Prints the Users as they appear on the screen
Kills the Users current

New User

When you setup a New User, it is recommended to set up the Persons User name as a Post code, this will pick up the person that is assigned to that Post; if there is a person in that post… The reason for this is to make life easier. If you set up by individual name you will have to set up that persons Privileges every time someone joins the Brigade. By doing it by Post code, the Privileges are already set up. You can add additional Privliges by using the Persons name… I will go into more detail.

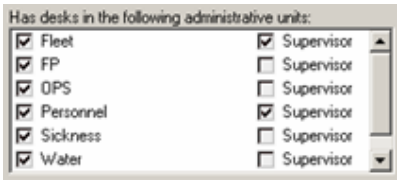
DBA - Database Administrator

DBA stands for Database Administrator. Users that are flagged as DBAs have access to every part of the system, effectively bypassing the privilege system. Only DBAs can perform the functions within this document.

As DBAs have access to all parts of the system, only a very limited number of users should be given this level. Only those people that need to perform the functions within this document should be DBAs, it is possible to allocate privileges to all other users to allow them restricted access to the relevant modules and functionality.

Administrative Units

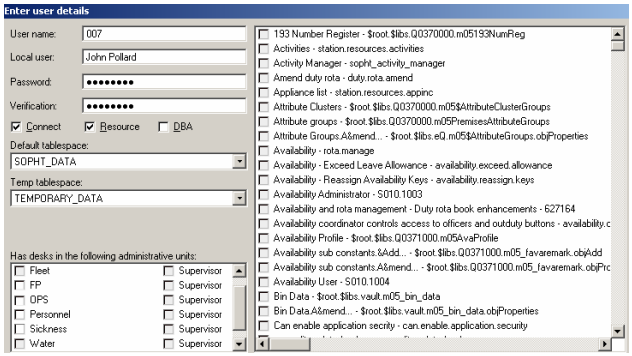
This specifies the Query Busters and User Defined Queries a user has access to. The Administrative units should be reflective of the physical units/departments within the brigade. It is possible to have more than one unit for each department – for example you may have a Personnel System Owner unit and a Personnel User unit. Administrative Units are allocated to users via the User Administration window.



New User Details

Generally, 'Post Codes' are used as the 'User Names' for the system. This means that if a person moves into an existing Post then the Privileges will have already been setup.

- Click onto New User icon if you are setting up a new personnel
- Enter the Post Code as the User Name



- Hit the tab key on your keyboard

The system will pick up the person that is in that post and put them in the Local User box.

- Enter a Password
- Enter a Verification of the Password
- Click into the Connect box

This allows the user to have access to the Database. Should always be set to Yes

- Click into the Resource

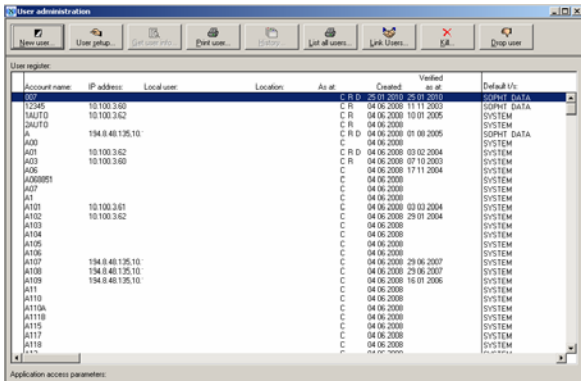
This allows the user to use Database Resources. Should always be set to Yes

Only click into the 'DBA' box if the User have access to every part of the system

Assign Additional 'Offices' (Departments) to a User

The Offices that are assigned to your **Post Code** will appear in a 'Select Office' box – as shown – these offices are assigned to you to run queries. i.e. you will be able to run queries and find information within FP and Ops.

At the top of the Global Navigator menu press the User Administration button - this is a 'two faces' icon

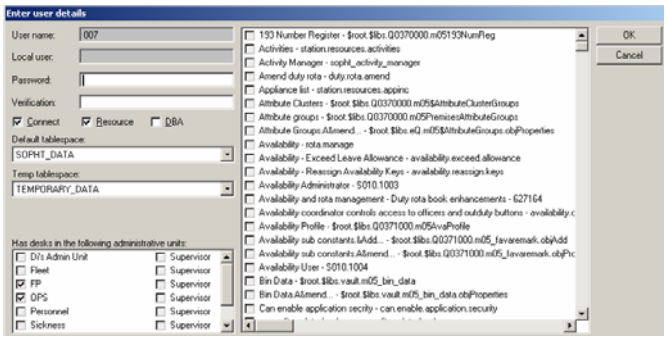


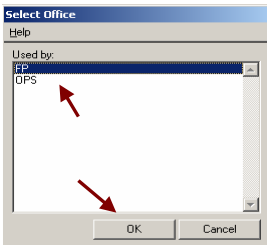
- Click onto the Two faced icon

User Administrator window will appear

- Click onto your User Name
- Click onto the User Setup icon if you are to amend a personnel usage

As you can see the two 'Offices' (departments) that were on the 'Select Office' window

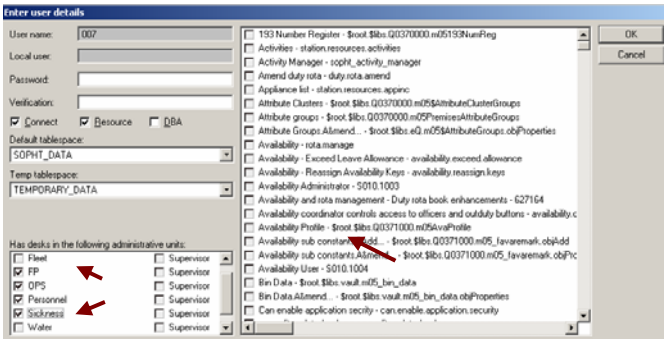




When you first started up PharOs (as shown) the Officers that have been allocated to you will appear in the box – as shown. In this example there are two Officers assigned.

I have now clicked into more of the boxes to give the User more access to different 'Offices' (departments).

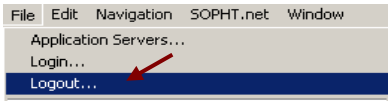
The list on the left hand side will populate automatically when you put personnel into certain profiles.



- Click OK button

Now let's **LOG OUT** the system

- Click onto File
- Scroll down and Click onto Logout



A dialog box will appear asking if you want to close the current session

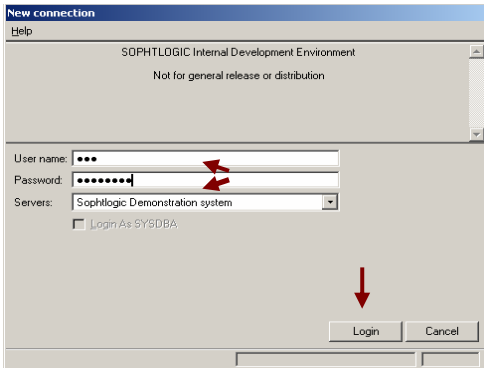
- Click onto the Yes Button

Now let's LOG back ON to the system.

- Click onto File
- Scroll down and click onto **LOGIN**

The 'New Connections', window will appear

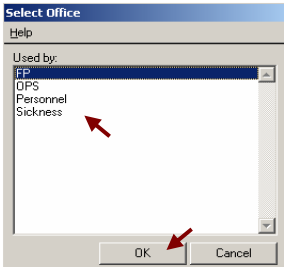
- Enter your Username
- Enter your Password
- Click onto the Login button



Let's see if Personnel, Sickness have been added to the Office window.

As you can see, you have successfully added more 'Offices' (departments) for the user to access.

- Choose one of the 'Offices' (departments)
- Click onto the OK button

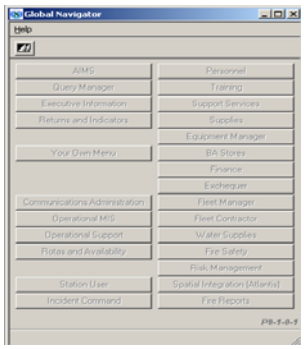


The Offices allocated within the 'Select Office' box specifies the Query Busters and User Defined Queries a User has access to.

So far all we have done is link the user to a location and assign departments to the User account.

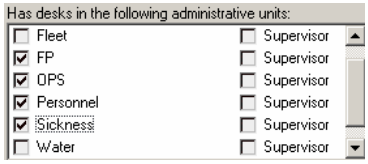
When you log out > login the 'Global Navigator' will still be greyed out

Now we need to assign the queries / privileges to the user



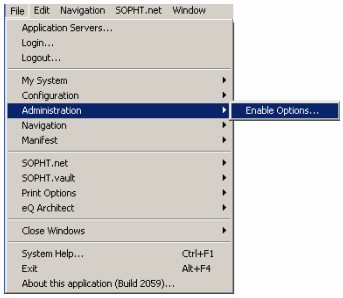
Setting Query Buster Libraries

When allowing what Queries the Fire Safety Services wants the Post / User to see, you will need to set up the Query Buster Library. This allows the user to access the Queries within the Library which is linked to the Administration Unit (departments). This also links them to receive group emails.



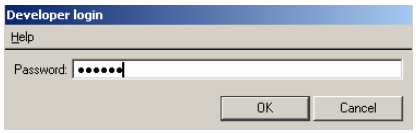
When you have set up the Administration Units desks (departments) in the User Administration setup window, you now need to set up the Query Library.

Depending on your Privileges you must be logged into the Administration to access the drop down menu list…



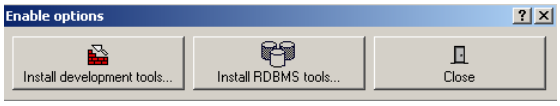
- Click onto File
- Scroll down to Administration
- Click onto the Enable Options

A Developer Login dialog box will appear



- Enter the Password

The Enable Option box will appear



- Click onto the Close icon

The other buttons are for the Developers

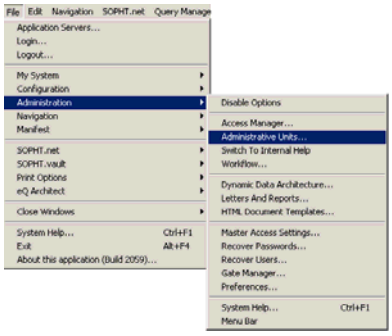
If a User does not have a Privilege for an option then it will either not be displayed, the option will be greyed out or upon selecting an option a message will appear explaining that the user does not have permission to use the relevant option.

By Control & Clicking on options as a standard user or as a DBA (not logged into development tools) this will tell the user what the Code is of the Privilege they do not have.

Administrative Units

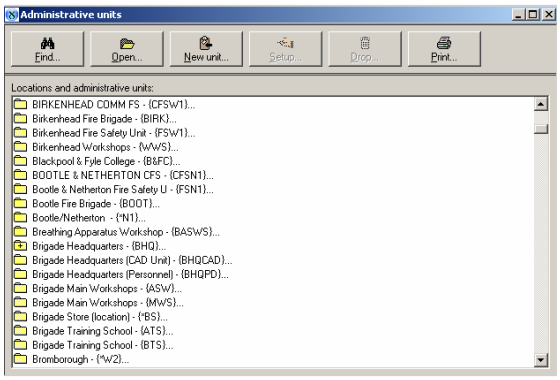
As mentioned previously, Administrative Units determine which Queries and Reports can be viewed by a User. These are generally setup for each Department within the Organisation.

Once you have accessed the drop down menu



- Click onto File
- Select Administration
- Click onto Administration Units

Administration Units window will appear

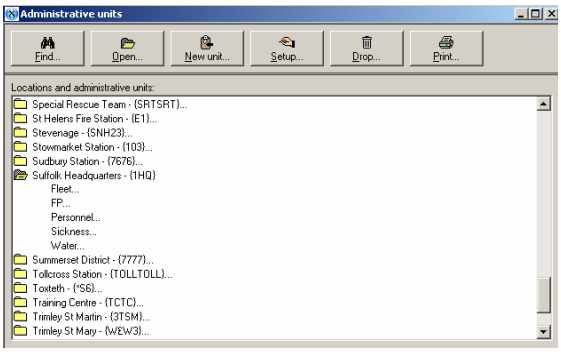

Administrative units
Find...
Open...
New unit...
Setup...
Drop...
Print...
Locations and administrative units:
BIRKENHEAD COMM FS - (CFSW1)...
Birkenhead Fire Brigade - (BIRK)...
Birkenhead Fire Safety Unit - (FSW1)...
Birkenhead Workshops - (WWS)...
Blackpool & Fylde College - (B&FC)...
BOOTLE & NETHERTON CFS - (CFSN1)...
Bootle & Netherton Fire Safety U - (FSN1)...
Bootle Fire Brigade - (BOOT)...
Bootle/Netherton - (*N1)...
Breathing Apparatus Workshop - (BASWS)...
Brigade Headquarters - (BHQ)...
Brigade Headquarters (CAD Unit) - (BHQCAD)...
Brigade Headquarters (Personnel) - (BHQPD)...
Brigade Main Workshops - (ASW)...
Brigade Main Workshops - (MWS)...
Brigade Store (location) - (*BS)...
Brigade Training School - (ATS)...
Brigade Training School - (BTS)...
Bromborough - (*W2)...

Within this window are the Locations

As you can see some of the folders have **+** on them. This is to let you know that some of the Location Folders have more than one Administration Units desks (departments) linked to it.

- Double Click on one of the Folders with the **+** on it

The list of Administration Units Desks (departments) for that Location will appear.



Add a Department to a Location

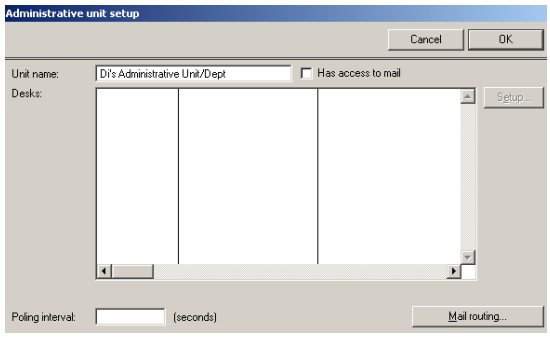
To add a Department to a Location

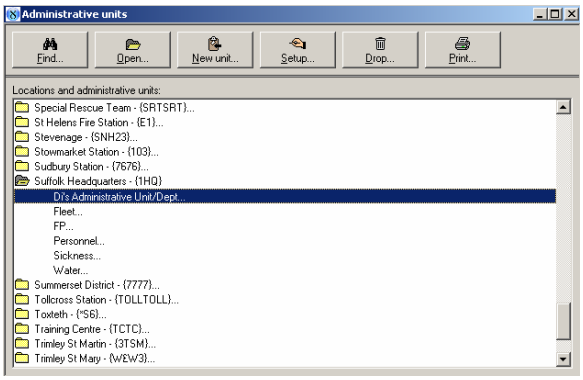
- Click onto the New Unit icon

- Enter the name of the new Department Name

If you want the user to receive the group email

- Put a tick in the Has Access to Mail box
- Click onto the OK button

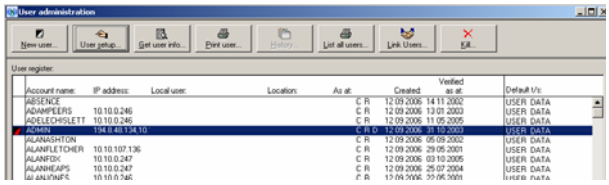




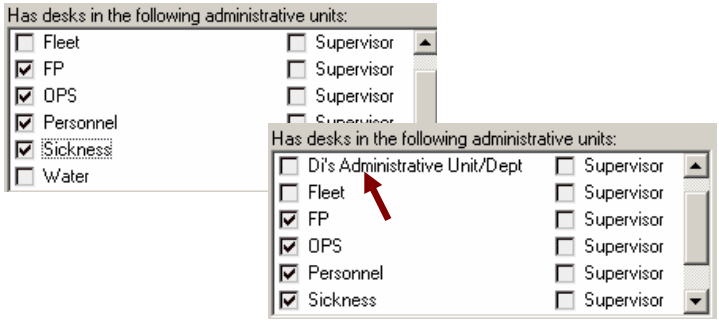
As you can see the New Department that you have just entered has appeared in the list under that Location

Now go back into User Administration

- Click onto the Two Faces icon
- Find the User
- Click onto the User Setup icon



As you can see in the Administrative Units the New Department has now appeared

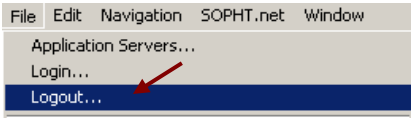


- Now tick into the box of the New Department

You will need to refresh the system

Now let's **LOG OUT** the system

- Click onto File
- Scroll down and Click onto Logout



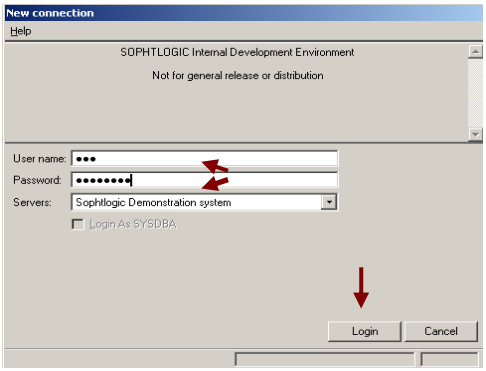
A dialog box will appear asking if you want to close the current session

- Click onto the Yes Button

Now let's LOG back ON to the system.

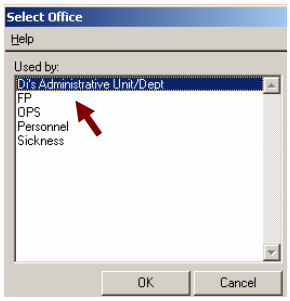
- Click onto File
- Scroll down and click onto LOGIN

The 'New Connections', window will appear



- Enter your Username
- Enter your Password
- Click onto the Login button

As you can see the department you had entered is now in the Office List



- Click onto the new Department
- Click onto the OK button

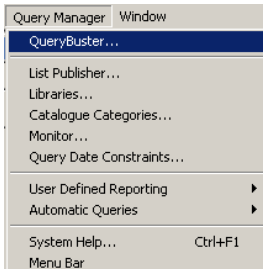
Linking the Department to the Query Library

Based on what Queries the Fire and Rescue Service wants their staff to see, the Administrator/DBA need to link the user to the 'Query Library'.

On Global Navigator

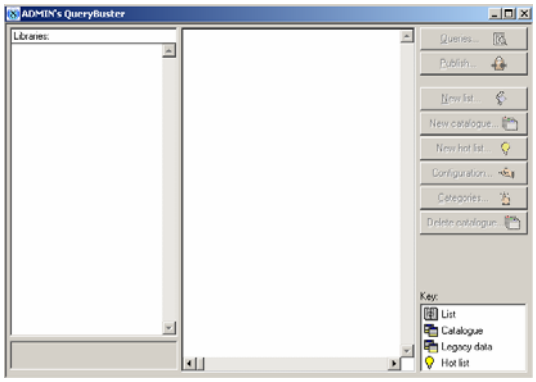
- Click onto Query Manager button

This will appear in the toolbar



- Click onto Query Manager
- Click onto Query Buster

The Query Buster window will appear



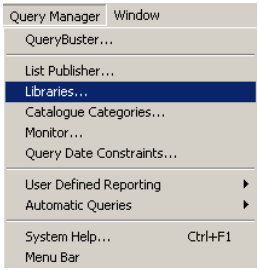
As you can see there is no User Definable List of Libraries within the Query Buster Libraries

This means the User Definable List of Libraries which are created to reflect Departments can not see any Queries from other Departments

You will need to set up the User Definable List of Libraries so that the User/Post is allowed to access

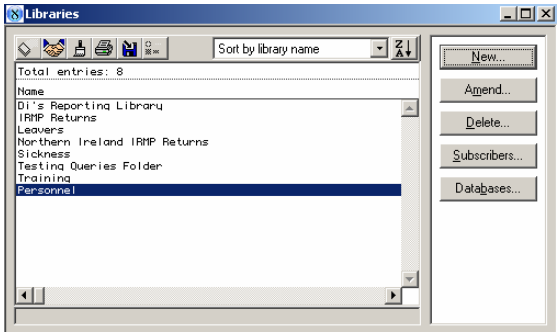
To do this

Close the Query Buster window



- Click onto Query Manager
- Click onto Query Libraries

The Libraries window will appear



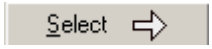
Within the window the User Definable List will appear

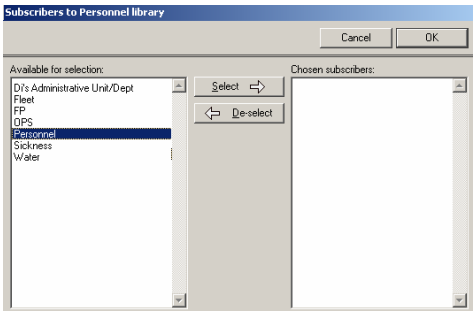
- Click onto one of the options in the User Definable List
- Click onto the Subscribes button

Within the Subscribers window

On the 'Available for Selection' list (left) are all the Admin Unit Departments that are in the Administrative Users window

- Click onto the Department that you set up earlier
- Click onto the Select button

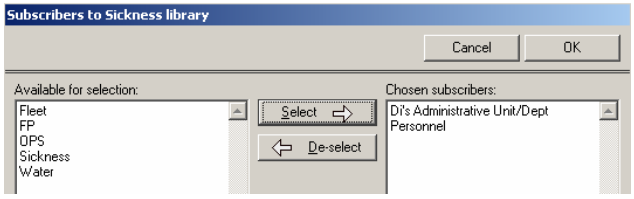




This will move the option chosen from the 'Available for Selection' list on the left of the window to the 'Chosen Subscribers' list ion the right of the window

Repeat this process until you have selected all the departments the 'New' Department can see/access

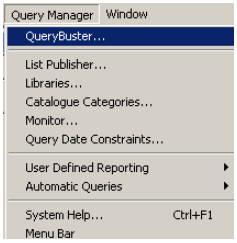
- Click onto the OK button



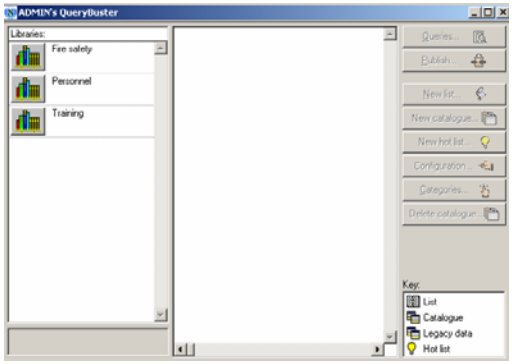
This is the same process to remove Query Access from a Department. Just select the 'De-Select' button

Re-open Query Buster

- Click onto Query Manager
- Click onto Query Buster



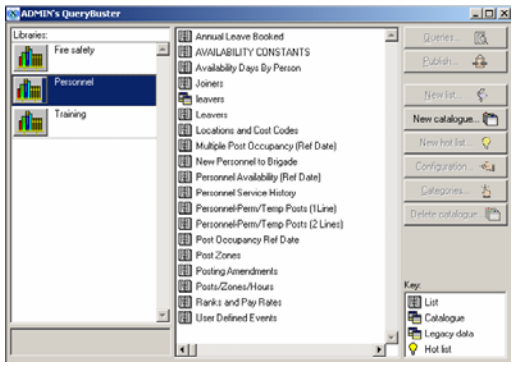
The Query Buster window will appear



You have now given the Department access to see Queries from other Departments.

- Click onto one of the Department icon

Any Queries that have been set up will associate to that Library



Three steps to check that the Query Library has worked

1. Have a look of what Administration Units the User Name/ Post Code has access to – (Two Faces Icon)
2. Setup and/or assign the Department to the User/Post – (Privilege Profile)
3. Subscribe the Query Buster Library to the Departments – (Library)
4. In Query Buster you should see the Libraries – (Query Buster)

Privileges

A privilege allows a User or Group of Users access sections of the system. Privileges are broken down into the following groups:

- Modules
- Menu options
- Buttons
- Functionality

User Administration - Privileges

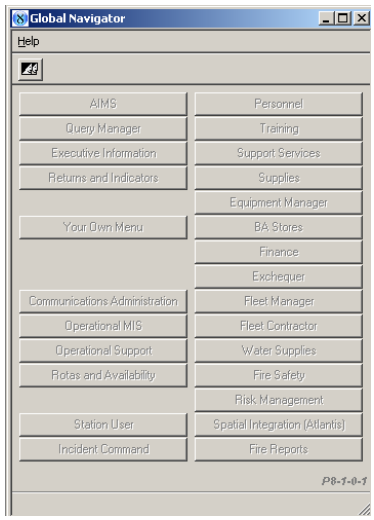
The User Administration window shows a list of all the Privileges within the system. Although this can be used to View and Amend a person's Privileges, this is **NOT** the most efficient way to do so, as many mistakes can occur.

Setting Up New User Privileges

You have now set up the **Post Codes** and the **User** has been assigned to that **Post.**

If you log on with the **User Name/Post Code** and **Password** for that User.

The Global Navigator window will appear.



As you can see everything is greyed out.

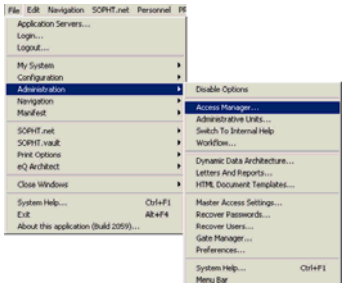
This is because you have No Privileges set up under your User Name/ Post Code.

Now you need to set up the Privileges to the User Name/ Post Code.

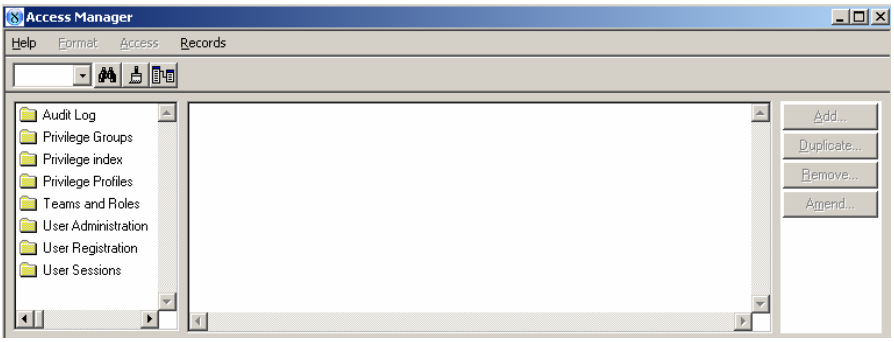
To Set Up the Privileges you now need to go back into Administrator and go to Access Manager…
Remember - In order to allocate Privileges, you must be logged into the Administrative Tools: pg

Access Manager

- Click onto File
- Click onto Administration
- Scroll over and Click onto Access Manager



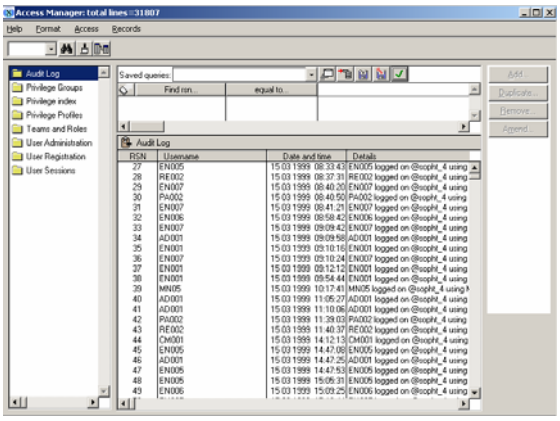
The Access Manager window will appear



Audit Log	This gives a full history of when users have Logged into the Database.
Privilege Index	All the Privileges within the system that can be set up to a Profile or User
Privilege Profiles	Privileges are associated to Profiles and then Profiles are associated to Users
User Administration	This functionality replicates that of the previously mentioned User Administration window.
User Registration	This shows every User/Post and their Password.
User Sessions	This shows all open Sessions on the Database.

Firstly, let's go through each folder and see what they do…

Audit Log



This gives a full history of when users have logged into the database.

To access the list

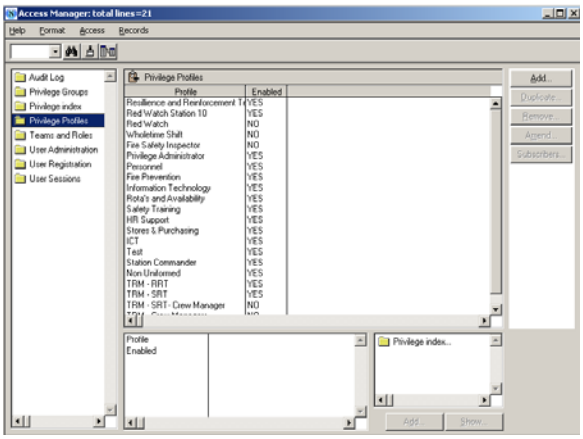
- Click onto the Audit Log folder
- Click onto the Green Tick

Privilege Profiles

The most efficient way to manage Privileges is by creating Privilege Profiles. This is a grouping mechanism – **Privileges** are associated to **Profiles** and then **Profiles** are associated to **Post Codes / User Names**. '**Profiles'** generally relate to physical Offices (departments) within the Organisation i.e. Training, Personnel, Fire Safety, Fleet, ICT etc.... A Office (department) may require a number of Privilege Profiles.

There may be an Administrator Profile that can setup all of the Static/Lookup data and a Standard User.

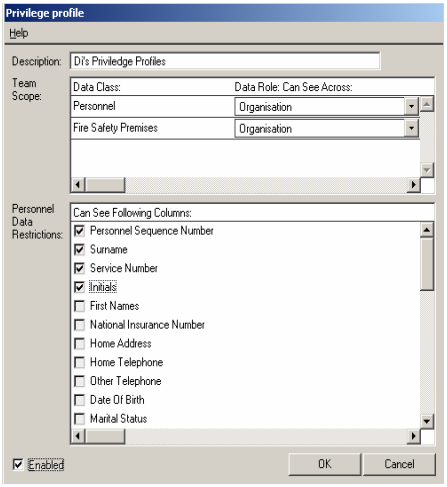
As you can see a list of Privilege Profiles has appeared



To Add, Amend or View another Privilege Profile

- Click onto the Add or Amend button

The Privilege Profile window will appear



In the Description box

- Enter the Name for the Privilege Profile

This could be Retained Watch Officers – FS District Managers – Control Room Supervisor – Station Managers – Watch Officers – FS Inspecting Officers - Fleet Management Group – Whole Time - Personnel – Sickness Report Administration - Operational IPDS Users – Central Crewing Office - Training Staff - ICT Dept - Occ Health Staff – Accounts Staff – etc…

The Personnel Data Restrictions determines which fields this User will be able to amend on the Personnel Record Card.

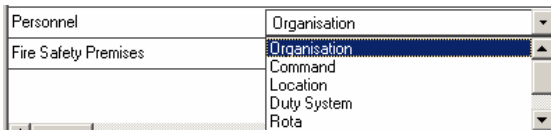
These are Mandatory columns

Personnel Sequence Number	Surname	Service Number
Initials	Upper Case Convention of Surname	Support Service Code
Scale - Mileage Category	Pin Number	

- To enable anymore columns – a check box you must be selected by ticking the boxes.

The Information Control Section determines what records a user in this profile can see – this forms the basis of the who can See what Functionality. By default this will be set to Organisation so that the user will be able to see Personnel and Fire Safety Premises across the whole Organisation.

The options are Organisation, Command, Location, Duty System, Rota, Post, Duty System Type.



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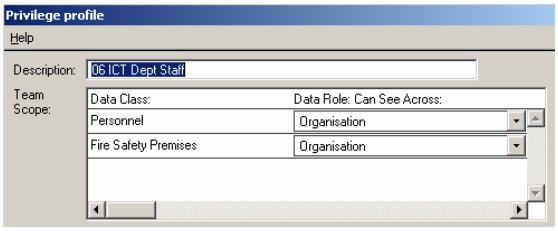
On the next page are a few examples

Below are some examples of what Post Codes / Users will lint to which Team Scope in Privileges Profile.

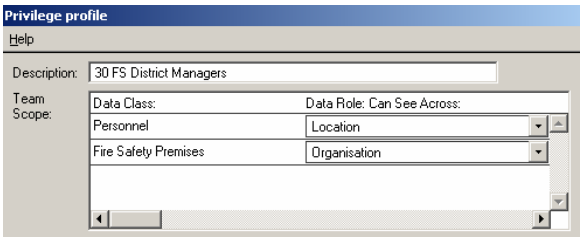
Personnel: **Organisation**
Fire Safety Premises: **Organisation**

ICT Dept Staff / Equal Opps / Account Staff / Water Staff / Line Manager / Retained Watch Officers / Divisional Managers / Control Room Staff / Training Staff / Fleet Management Group / Central Crewing Office / Occ Health Staff / Personnel / CHR Transaction Team / Support Service Staff / Control Room Supervisor / Principal Officers Group / Principal Off / Admin Supp / Planning, Performance & Policy / Health & Safety / Fleet Workshop / Fleet Administration…



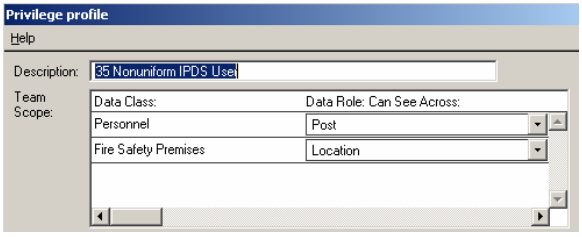
Personnel: **Location**
Fire Safety Premises: **Organisation**

FS District Managers / Inspection Officers / Station Managers / Watch Officers / Administration Team / Admin Support /



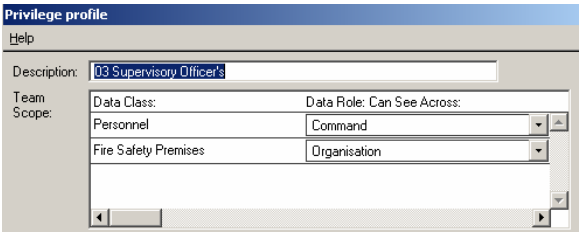
Personnel: **Post**
Fire Safety Premises: **Location**

Non-Uniform IPDS Users



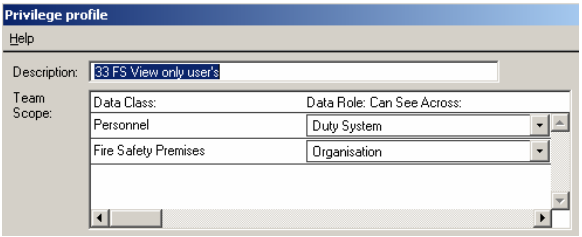
Personnel: **Command**
Fire Safety Premises: **Organisation**

Supervisory Officer's



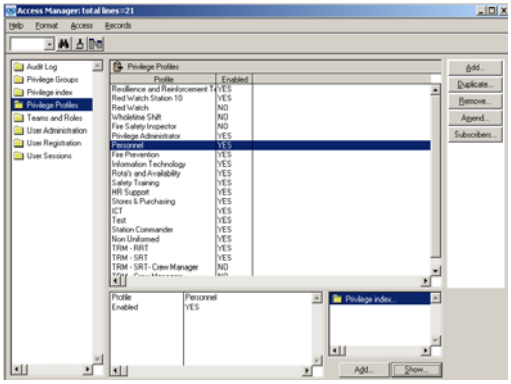
Personnel: **Duty System**
Fire Safety Premises: **Organisation**

FS View Only User's



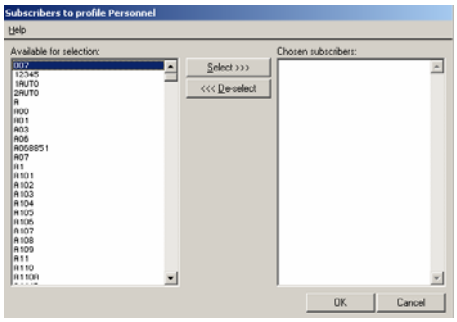
Subscribers

There is a Subscriber option on the right which allows Post/Users to be attached to the Selected Profile Office (Department).



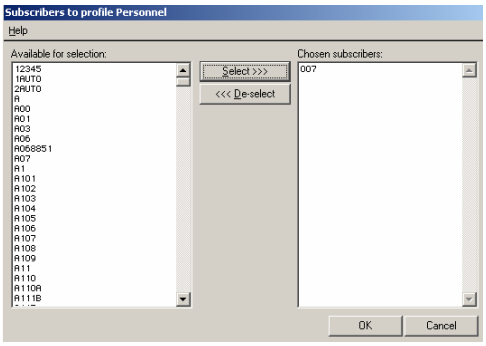
- Click onto the Privilege Profile options
- Click onto the Subscribers button

In the window on the right are the Post Codes/User Names



To select the Post Code/User Name you want to be allocated to this Privilege Profile

- Click onto the Post Code/User Name
- Click onto the Select button

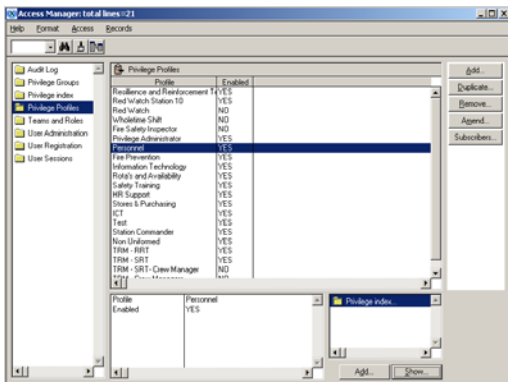


Multiple Users can be selected by dragging the mouse over the list, or by using control or shift while clicking.

- Click on to the OK button

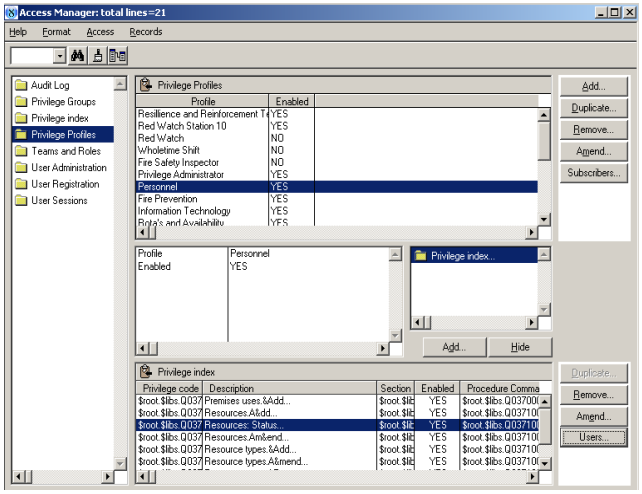
These are the Post Codes/User Names that are allocated to the Profile

The Privilege Index sub-option will list all of the privileges attached to selected profile.



- Click onto the Privilege Index folder
- Click onto the Show button

This should not be used to allocate Privileges to the Profile.



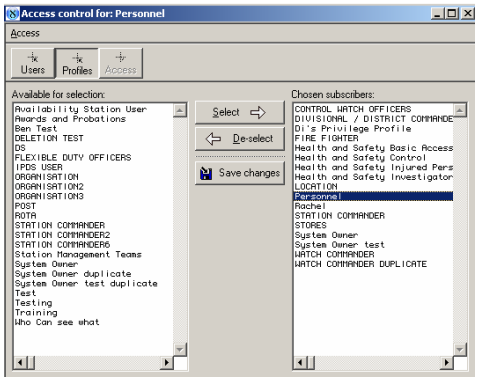
This example shows the Profile for - Personnel

- Click onto the show button

The Privileges that have been allocated to this User/Post will display in the window at the bottom – as shown

- Click onto the Privilege
- Click onto the Users button

Here it will show what User/Post has been assigned



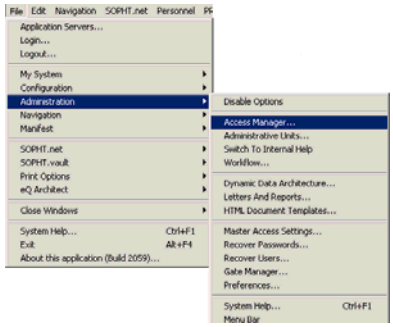
Notice the 'Profiles' List in the 'Available Selection' is the same as the Privilege Profile List

Under a New Privilege Profile there will be no Privileges allocated – This must be done within Privilege Index and Control Click option.

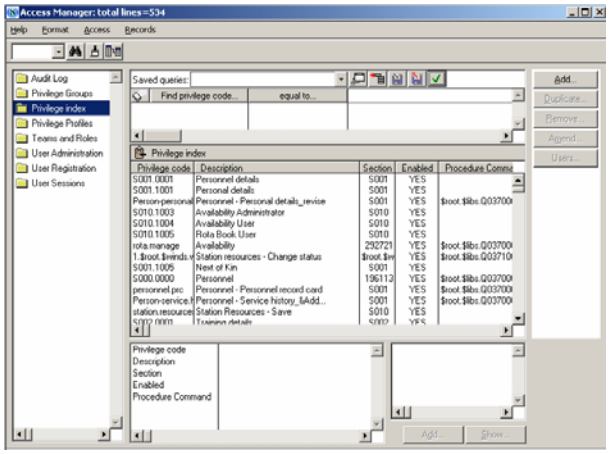
Privilege Index

The Index Privileges are the Coding you need to set up to access the Privileges for all Sections, Buttons, Sub Menu etc within the system.

- Click onto File
- Scroll down to Administration
- Click onto Access Manager



Access Manager Window will appear

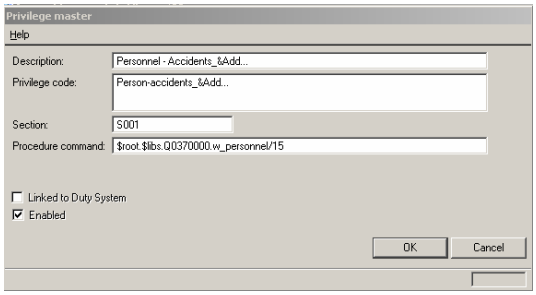


- Click onto Privilege Index folder
- Click onto the Green Tick icon

A list of all privileges functionality, which were previously set up, will appear – as shown -

- Click onto one of the Privileges
- Click onto the Amend button

You will notice that the control & click privileges appear in this list.



If the sub-Menu option is not in the list then you need to set up the coding –

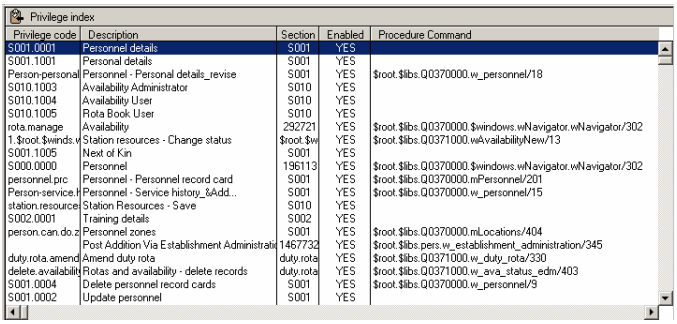
- Click onto the Add button

Please Call Sophtlogic before attempting to do this…It wouldn't be usual for Fire & Rescue Services to setup or amend their own Privileges – it is usual for Sophtlogic Support to set them up and for the FRS just to allocate them.

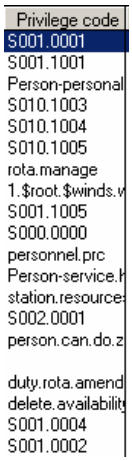
Each Privilege will have its own coding – as shown in the tables below

What each column means

Field	Description
Privilege Code	This is the code that is used to identify the privilege. For existing control & click privileges, this should not be changed. For manual privileges this must be entered exactly
Description	Free text description
Section	pharOS is broken down into modules. Each module has it's own Section code. See below
Enabled	This must always be selected for current privileges. Old privileged can be turned off or archived
Procedure Command	If this privilege was created via the control & click method, this will show the line of code which created the privilege. This is for debugging purposes and should not be manually changed
Linked to Duty System	Old functionality


Privilege index
Privilege code
Description
Section
Enabled
Procedure Command
S001.0001 Personnel details S001 YES
S001.1001 Personal details S001 YES
Person-personal Personnel - Personal details_revise S001 YES $root.$libs.Q0370000.w_personnel/18
S010.1003 Availability Administrator S010 YES
S010.1004 Availability User S010 YES
S010.1005 Rota Book User S010 YES
rota.manage Availability 292721 YES $root.$libs.Q0370000.$windows.wNavigator.wNavigator/302
1.$root.$winds.v Station resources - Change status $root.$w YES $root.$libs.Q0371000.wAvailabilityNew/13
S001.1005 Next of Kin S001 YES
S000.0000 Personnel 196113 YES $root.$libs.Q0370000.$windows.wNavigator.wNavigator/302
personnel.prc Personnel - Personnel record card S001 YES $root.$libs.Q0370000.mPersonnel/201
Person-service.h Personnel - Service history_&Add... S001 YES $root.$libs.Q0370000.w_personnel/15
station.resource Station Resources - Save S010 YES
S002.0001 Training details S002 YES
person.can.do.z Personnel zones S001 YES $root.$libs.Q0370000.mLocations/404
Post Addition Via Establishment Administrati 1467732 YES $root.$libs.pers.w_establishment_administration/345
duty.rota.amend Amend duty rota duty.rota YES $root.$libs.Q0371000.w_duty_rota/330
delete.availabilit Rotas and availability - delete records duty.rota YES $root.$libs.Q0371000.w_ava_status_edm/403
S001.0004 Delete personnel record cards S001 YES $root.$libs.Q0370000.w_personnel/9
S001.0002 Update personnel S001 YES

Each Module has a 'Section Code'



Section Code	Module
S001	Personnel
S002	Training
S003	Water
S004	Support Services
S005	Finance
S006	Fire Safety
S010	Rotas and Availability
S011	Operational MIS
S012	Mobilisation Interface
S034	Fleet
S035	Fire Reporting

In the table on the right there is a list of the Section Codes.

As you can see the Section Codes are used in the Privilege Code column.

Each 'Section Code' starts off with an S then a number.

There are some privileges which need to be allocated manually. Sometimes these allow access to groups of functionality, rather than having to allocate lots of individual privileges. Other manual privileges might include personal preferences on how the system operates the ability to over-ride system validation etc.

These codes are the Sub- Menu option codes. You must use code **S000.0000** to view the Sub-Menu in the **Personnel Record Card** and **Fire Safety –Premises Record Card**

This relates to all main Privilege Profiles for example: **Training** S000.0001 – **Fleet Manager** S034.0001 –**Station User** S010.0002 – **Finance** S005.0001 - **Fire Prevention** S006.0001 – **Query Library** S042.0001 – **Stores** S004.0002 – **Support Services** S004.0001 – **Water Supplies** S003.0001 – **Strategy** S079.0001 - **Fleet Contractor** S034.1001 –

Others will have – **Availability** rota.manage – **Operational MIS** ops.mis – **Fire Reports** fire.reports – **Incident Command** inc.comm – **Equipment Manager** equip.manage - **Exchequer** exch.access – **Communications Administrator** communications.administrator – **Your Own Menu** your.own.menu

The Main Privilege Profile Headings (above), in the Procedure Command, all end in **...$window.wNavigator.wNavigator/302**

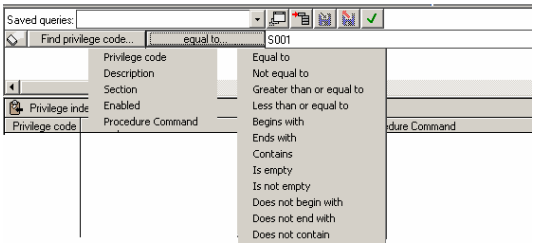
The **Coding** below is for **Premises Record Card**.

Privilege Code	Description
S000.0000	**If user does not have this then Personnel Record Card will be read-only**
S001.0002	Update Personnel
S001.0004	Delete Personnel Record Cards
S001.1001	Personal Details
S001.1002	Service History
S001.1003	Posting Amendments
S001.1005	Next of Kin
S001.1006	Employer details
S001.1007	Mileage Claims
S001.1008	Sickness, Sickness Interviews, Absence
S001.1009	Accidents
S001.1010	Qualifications
S001.1011	Awards and Commendations
S001.1012	Probations
S001.1013	Display Ethnic Origin on PRC
S001.1014	Dependants
S001.1015	Contact Details
S001.1016	User Defined Events
S001.0017	Search Personnel Record Cards
S001.1018	Salary History
S001.1019	Sickness Interviews
S001.1020	Absence
S001.1021	Retained Pay Lite
S001.1031	Skill Profile
S001.1041	Medical Calendar and Medical Referrals
S001.1042	Medical Records
S002.1001	Training records (Section code S002)
Personnel.employment.conditions	Employment Conditions
Personnel.scale.issue	Scales of Issues
Personnel.pay.ref	Pay Reference
Personnel.competence	Role Based Competency
Personnel.payroll.history	Payroll History
Personnel.tui.accounts	TUI Accounts
Personnel.sickness.monitoring	Sickness Monitoring
Personnel.religious.belief	Religious Beliefs
Personnel.documents.images	Documents and Images

Search for a Privilege

To enter the Sub-Menu Option in the Premises Record Card (PRC) you first need to set up the privileges.

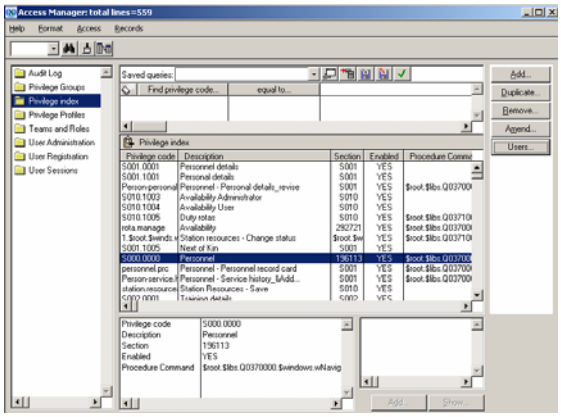
To do this…



- Choose your search criteria

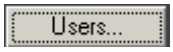
From the list above

- Enter the Section code or description
- Click onto the Green Tick

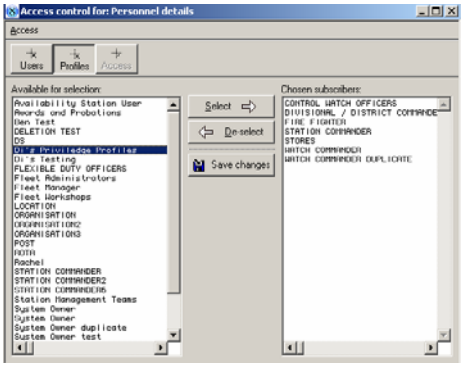


A list will appear that is associated with the search

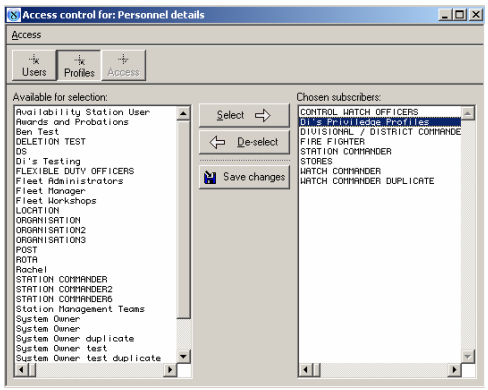
- Click onto the Privilege you want to assign
- Click onto the Users button



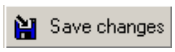
The Access Control window will appear



- Look for the Post Code / Users
- Click onto the Select button



- Click onto the Save Changes button



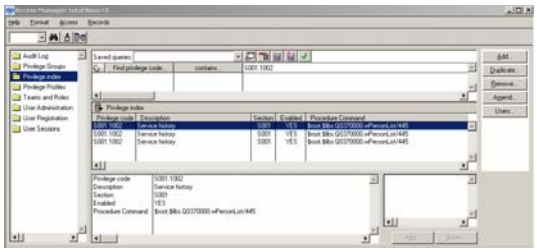
- Click onto the **X** in the top right corner

Log back into the Users account

As you can see the 'global Navigator is now showing access to the Personnel button

Go back to the DBA account

Add another Privilege Sub-Menu



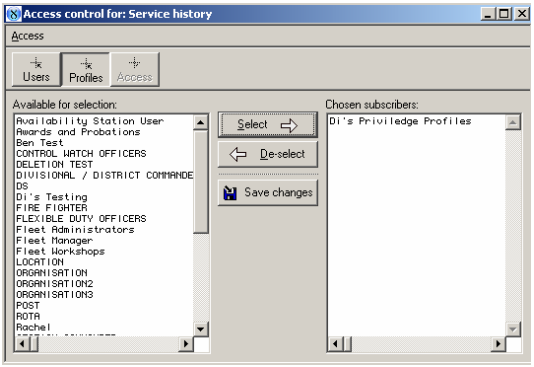
- Choose your search criteria

From the code list above

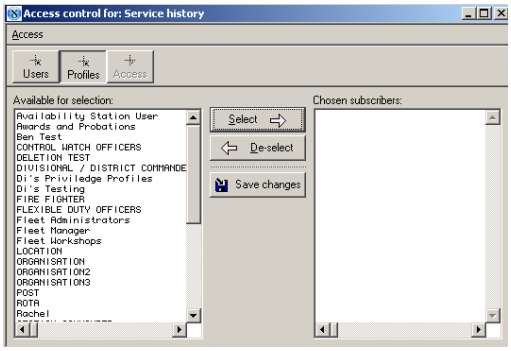
- Enter the Section Code or Description
- Click onto the 'Green Tick' button

- Highlight a Privilege
- Click onto the Users button

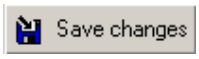
The Access Control window will appear



- Look for the Post Code / User
- Click onto the Select button



- Click onto the Save Changes button



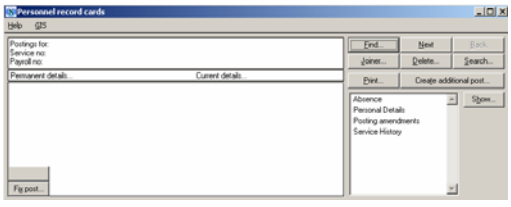
- Click onto the **X** in the top right corner

To check to see if the Privileges are appearing into the PRC Sub-Menu window

Again you would need to re-login to see the privileges previously assigned

- Open Premises Record Card

As you see the Privileges are in the PRC Sub-Menu window



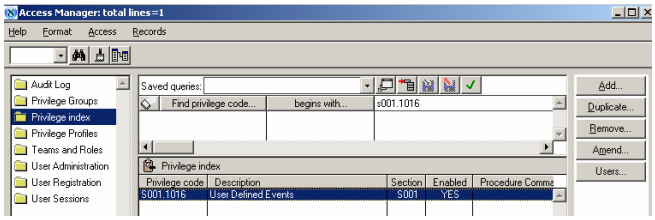
Keep repeating this process until you have set up all the Sub-Menu Privileges

Sub-Menu Privileges

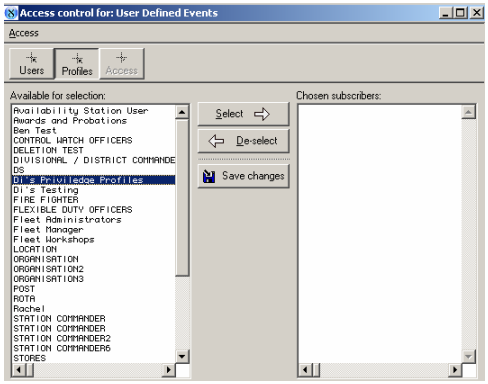
Once you have setup the new Post Code

You now need to assign the Sub-Menu Privileges

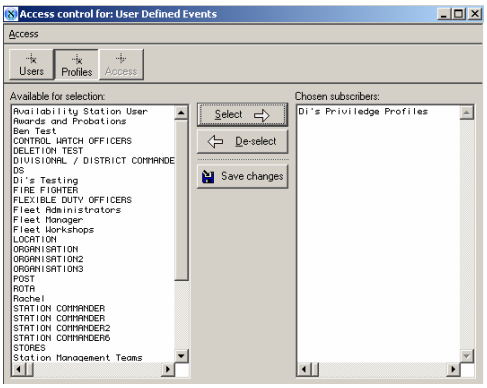
- Click onto File
- Click onto Administration
- Click onto Access Manager
- Click onto Privilege Index



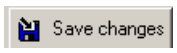
- Search for a Sub-Menu
- Click onto the Sub-menu
- Click onto the Users button



- Click onto the Profile
- Click onto the Select button



- Click onto the Save Changes button

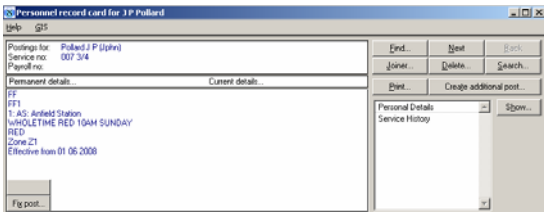


To check that the Sub- menu has now come available to the User

Log in as the User

Make sure the User that you are logging in as is linked to the Posting

- Click onto Personnel
- Click onto Personnel Record Card (PRC)



The Sub-Menu will be in the Sub-Menu window

Control & Click Privileges

Most menu options and buttons within the system are Control & Click Privileged.

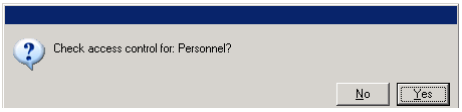
From the Global Navigator

- Hold down the Control button on the keyboard
- Click onto the module you want to allocate.

In my example, I clicked onto the Personnel Button – this will enable the Personnel Module Option. Most menu options will have privileges of their own e.g. 'Personnel Configuration', Postings Diary etc…

You can define the access by Ctrl Click on the individual topics within Personnel

A dialog box will appear

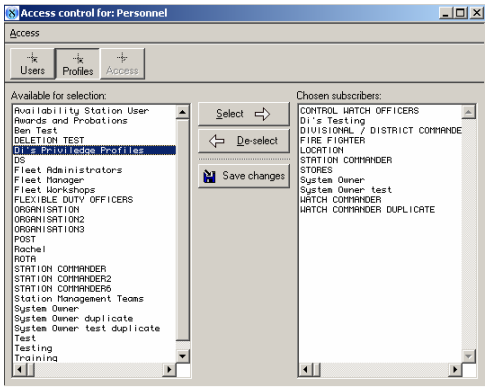


- Click onto the Yes button.

If the privilege does not exist then the user will be prompted:

Upon selecting Yes the following window will appear.

This is the standard Privilege Allocation window:



This window allows the allocation of individual Users and Profiles.

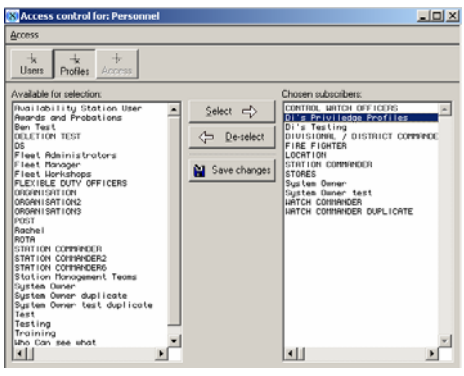
Multiple lines can be selected by dragging the mouse across records, or by using control or shift while clicking.

In the right hand side window is a list of all the Privilege Profiles

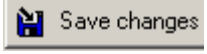
- Find the Privilege Profile that you set up
- Click onto your Privilege Profile

- Click onto the Select button

This will move the Privilege Profile from the list in the right side window to the list in the left side window.

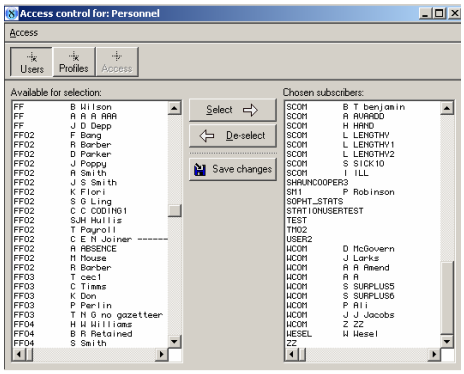


- Click onto the 'Save Changes' button



You **MUST** click the Save Changes button before closing this window.

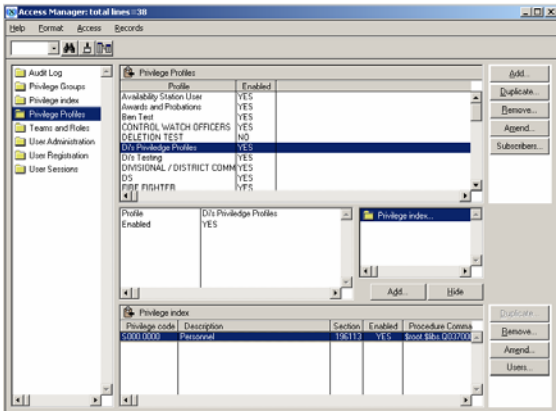
- Click onto the X to close the window



It is advised that wherever possible profiles are used rather than allocating privileges to users.

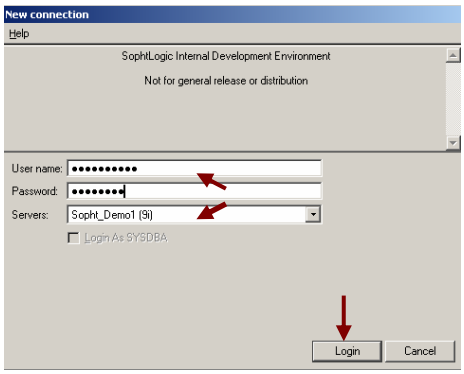
As you can see you can also allocate the privilege to individual Users. But this is not recommended…

As you can see in access Manager - Privileges Profile folder - Privileges Index window – the Personnel Privilege has been added to the Post Code / User



All the people who were allocated to the Privilege Profile you set up will now be able to access the Personnel Module

Checking Users Privilege Access



To check if the User has access to the Personnel Module

- Double click onto the Pharos icon
- Enter the Users - Username and Password
- Click onto the Login button

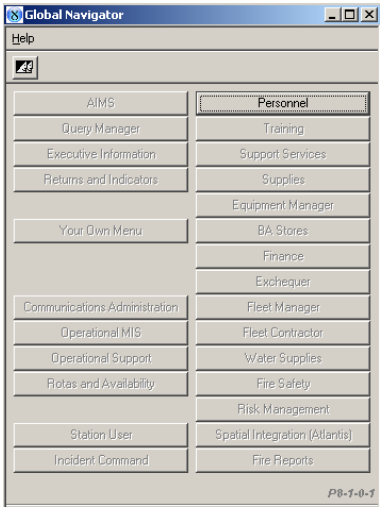
The Select Office will appear

Notice Personnel has now been added to the Select Office window – remember this is for Queries

- Click onto the OK button

As you can see the Personnel button is no longer greyed out

You can see the sections but if you click on any of them you will not be able to access them unless they have been Privileges to the User



Let's say you don't want the User to have full access to the Personnel Module and only have access to the Premises Record Card (PRC)

To have full access all the individual personnel privileges would have had to be assigned to the user or profile. To remove a Privilege go to page 48

Control & Click Privileges on Personnel Record Card

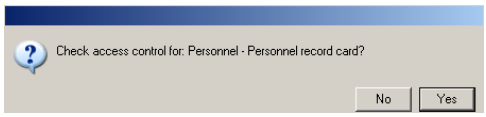
In Global Navigator

- Click onto Personnel button

The Personnel will appear in the toolbar

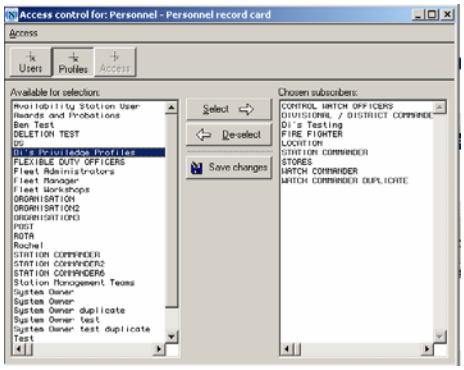
- Ctrl Click onto the Personnel Record Card

A dialog box will appear

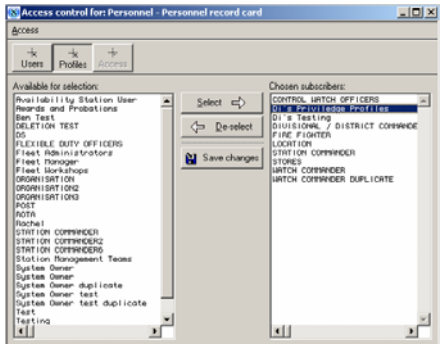


- Click onto the Yes button.

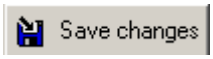
The access control window will appear



- Select the Post Code / User
- Click onto the Select button



- Click onto Save Changes button

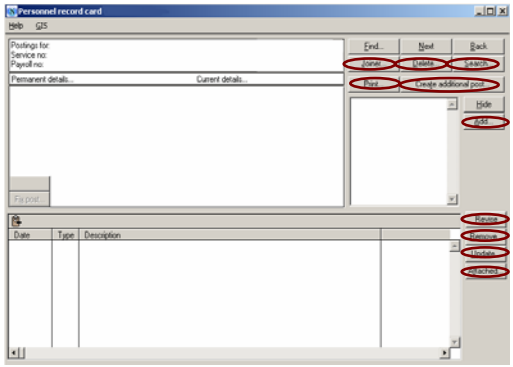


- Click onto the **X** to close the window

You will need to repeat the process by clicking onto each button, section etc to give the User the privileges within the system.

All of the buttons circled are privileged. For each sub-option, each sub-option button has a separate privilege.

All privileges, regardless of how they are allocated, are stored in the same place with a code and description. These can be viewed via:



Once you have set up the privileges to the Post Code / User, you will need to set up the sub-menu options with in Privilege Index

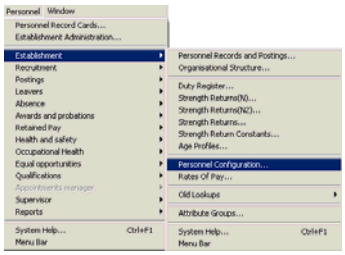
To set up the Sub-Menu options within PRC

Control & Click Privileges on Type 5 windows

Control & Clicking on menu options will bring up this Access Control window.

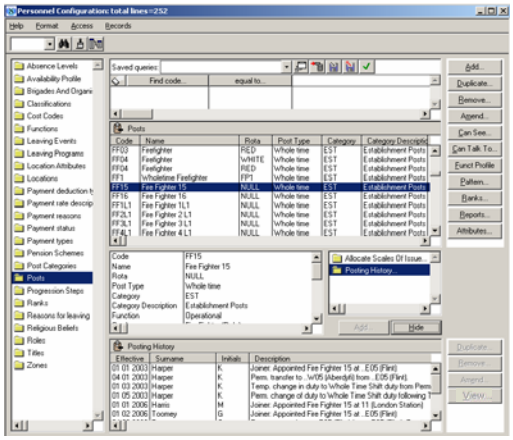
Type 5 windows are used throughout the system as a standard for setting up lookup data.

An example of this type of window:



- Click onto the Personnel button
- Scroll down to Establishment
- Scroll over and Click onto Personnel Configuration

This is a Type 5 window


Personnel Configuration: total lines=252
Help Format Access Records
Saved queries:
Find code... equal to...
Add...
Duplicate...
Remove...
Append...
Can See...
Can Talk To...
Funct Profile
Pattern...
Banks...
Reports...
Attributes...
Posts
Code Name Rota Post Type Category Category Description
FF03 Firefighter RED Whole time EST Establishment Posts
FF04 Firefighter WHITE Whole time EST Establishment Posts
FF04 Firefighter RED Whole time EST Establishment Posts
FF1 Wholetime Firefighter FF1 Whole time EST Establishment Posts
FF15 Fire Fighter 15 NULL Whole time EST Establishment Posts
FF16 Fire Fighter 16 NULL Whole time EST Establishment Posts
FF1L1 Fire Fighter 1L1 NULL Whole time EST Establishment Posts
FF2L1 Fire Fighter 2 L1 NULL Whole time EST Establishment Posts
FF3L1 Fire Fighter 3 L1 NULL Whole time EST Establishment Posts
FF4L1 Fire Fighter 4 L1 NULL Whole time EST Establishment Posts
Code FF15
Name Fire Fighter 15
Rota NULL
Post Type Whole time
Category EST
Category Description Establishment Posts
Function Operational
Allocate Scales Of Issue...
Posting History...
Add... Hide
Posting History
Effective Surname Initials Description
01 01 2003 Harper K Joiner. Appointed Fire Fighter 15 at ..E05 (Flint)
04 01 2003 Harper K Perm. transfer to ..\v05 (Aberdyfi) from ..E05 (Flint).
01 03 2003 Harper K Temp. change in duty to Whole Time Shift duty from Perm.
01 05 2003 Harper K Perm. change of duty to Whole Time Shift duty following
01 01 2006 Harris M Joiner. Appointed Fire Fighter 15 at 11 (London Station)
01 02 2006 Toomey G Joiner. Appointed Fire Fighter 15 at ..E05 (Flint)
Duplicate...
Remove...
Append...
View...

By Control Clicking on the buttons you can activate this Privilege to the User

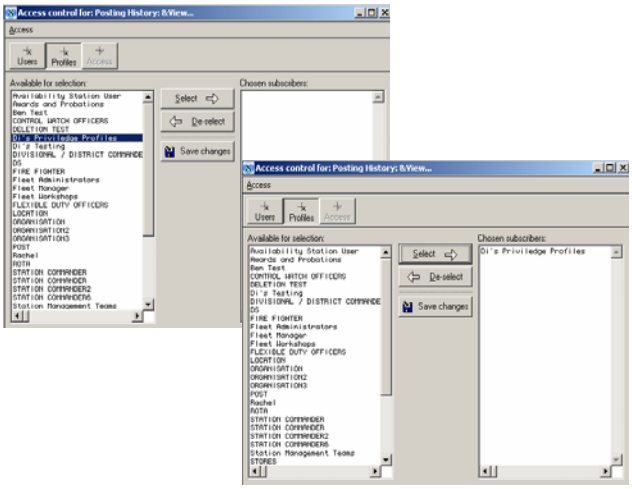
- Hold down the control button
- Click onto one of the buttons (I have clicked onto the View button)
- Click onto the Select button

- Click onto the Save Changes button

You should now be back in the Main Type5 window

- Click onto the button you Control & Clicked on

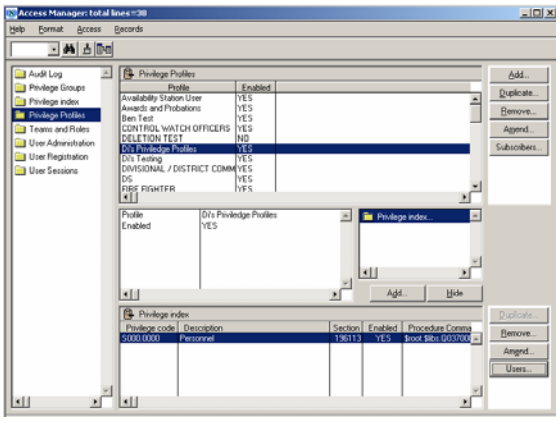
You should now be able to access that button



A non DBA can't assign Control Click Privileges, a DBA would already have all required privileges. Therefore in the example above you would need to logon as the User who has been assigned the privilege.

Remove a Privilege from a Post Code / User

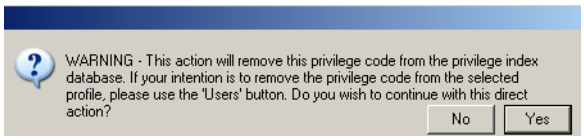
Within Access Manager



- Click onto Privilege Profiles folder
- Select the Post Code / User
- Click onto Posting Index Folder
- Click onto the Privilege

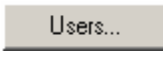
Do not Click onto the Remove button, but if you do

A dialog box will pop up

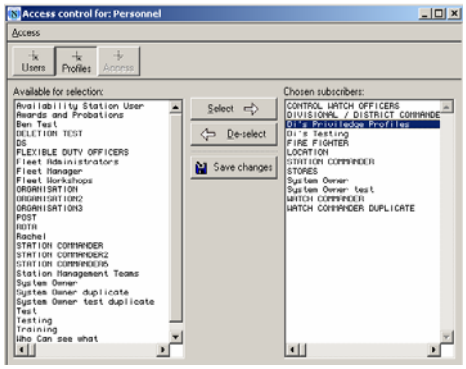

WARNING - This action will remove this privilege code from the privilege index database. If your intention is to remove the privilege code from the selected profile, please use the 'Users' button. Do you wish to continue with this direct action?
No
Yes

Warning you not to use this button to remove privileges and to use the Users button

- Click onto the NO button
- Click onto the Users button

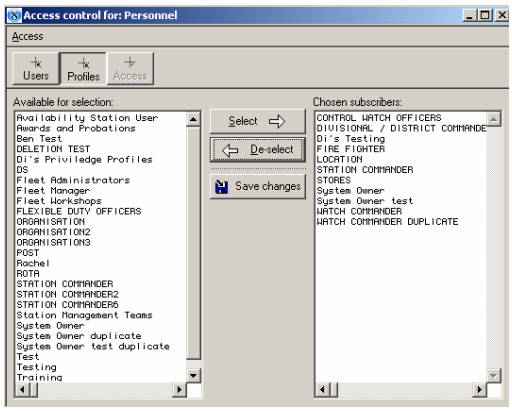


The access control window will appear

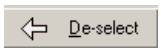


In the Left hand side window

- Click onto the Post Code / User



- Click onto De-Select button



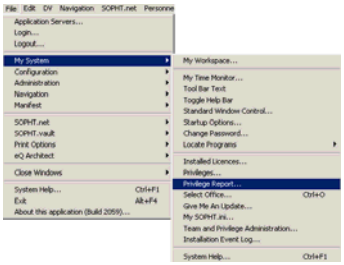
- Click onto the Save Changes button

- Click onto the in the top right hand corner to close the window

Privilege Report

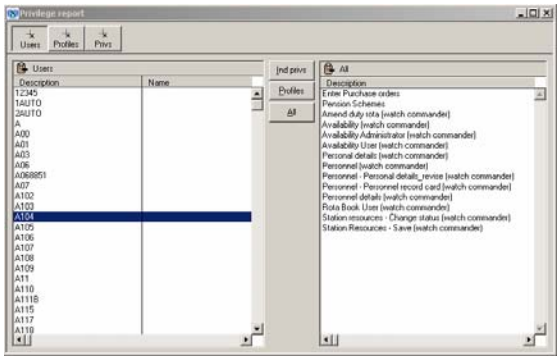
The Privilege Report is a good functionality to check who's in what Post and who has what Privileges

- Click onto File
- Scroll down to My System
- Click onto Privilege Report



This report can display the following:

For a User

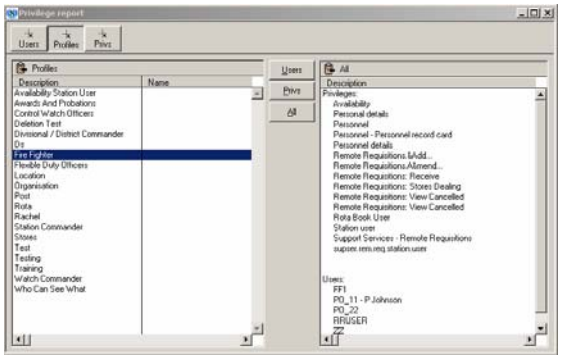


By default all Profiles are displayed to locate a User select the Users button

This will show all the Profile and Privileges associated to the selected User

Button	Will Show
Ind privs	Privileges that have been allocated directly to the selected user
Profiles	The profiles that the selected user is part of
All	All of the privileges that this user had, both individually allocated and allocated to the profiles which this person is in

For a Profile

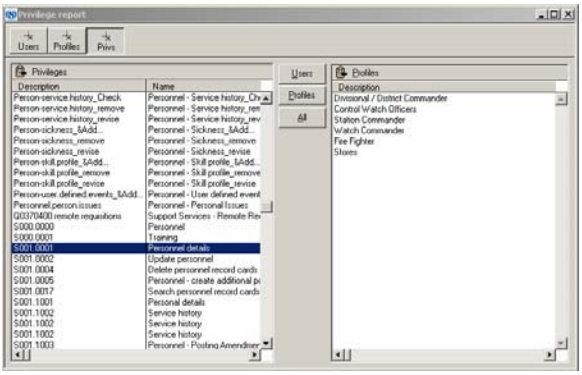


Selecting the 'Profiles' button displays a list of all Privilege Profile setup in the system

This will show the all Users are Privileges associated to the selected Profile

Button	Will Show
Users	Users that are part of the selected profile
Privs	Privileges associated to the selected profile
All	Both of the above

For a Privilege



Selecting the 'Privileges' button displays a list of all privilege setup in the system.

This will show the all Users and Profiles associated to they selected Privileges

Button	Will Show
Users	Users that have the selected privilege
Profiles	Profiles that have the selected privilege
All	Both of the above

Reporting Problems

There are 3 main types of problem that users are likely to experience:

Data is not being returned as expected –eg reports missing off some records
Error messages – eg Server object cannot be found
Software bugs – a series of events causes the system to not perform as expected

The procedure when a problem is found should be as follows:

- Make a note of the exact record that caused the problem – for a problem with a person make a note the service number and surname – ideally a screenshot can be taken (Print Screen and then paste into e-mail)
- Note the location of the window or report where the problem occurred
- Try to go back into the record and see if the problem can be recreated

If it is a problem with data not being returned as expected

- Check to make sure the setup related to that record has been done correctly
- Specify whether the problem found is preventing the user from working
- Report the problem

It is up to the IT department to specify how they want support issues to be handled. There are various options:

- All correspondence to go directly from the user to SOPHTLOGIC
- All correspondence to go directly from the user to SOPHTLOGIC, but IT are CC'd
- Users send problem to IT who log the problem and then send to SOPHTLOGIC, then SOPHTLOGIC can go directly to the user for more information if necessary
- All correspondence goes through IT

Options 2 and 3 seem to work best.

When SOPHTLOGIC receive a problem, an LSN (Log Serial Number) will be created and sent back. This is the SOPHTLOGIC reference for the issue and should be quoted when enquiring about any outstanding issues.

The problem will may be rectified in one of the following ways:

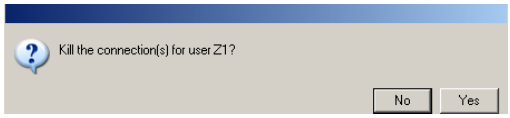
- User error – a member of the SOPHTLOGIC team will contact the user and inform them of why the problem occurred and, if necessary, will either correct the data or inform the user of how to do this
- Data problem – SOPHTLOGIC will rectify the data that is incorrect and investigate what has caused the problem
- Error messages – it may be necessary for SOPHTLOGIC to align the database (see alignment section)
- Software bug – depending on urgency
- If urgent – the test system will be patched and the user will be asked to test the problem there. If the problem is rectified then it will be copied out to the relevant users if not urgent – the problem will be rectified in the next release of the software.

To Kill a Users Connection

To Kill the connection for the Post Code - my example is postcode Z1

- Click onto the Kill icon

A dialog box will appear asking you are you sure you want to Kill all Connections for the User

- Click onto the Yes button 

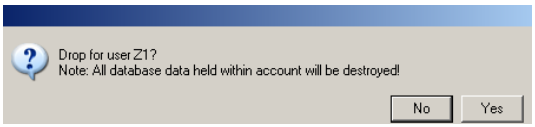
To Drop a User

This is Privileged access, I would NOT recommend you use this button, unless you really know what you are doing. By using the Drop User you will loose all information to do with the User. If you do want to 'Drop User'

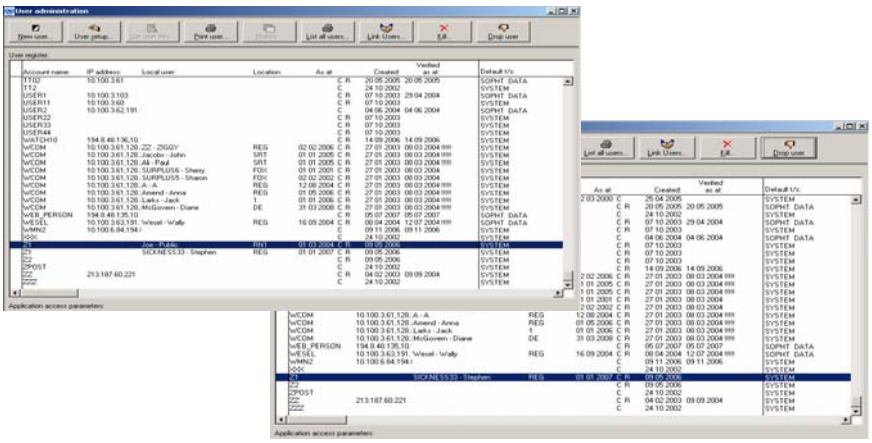
Please contact Sophtlogic before doing so.

- Click onto the Drop User icon

A dialog box will appear asking you are you sure you want to kill all connections for the User

- Click onto the Yes button 

As you can see the Post Z1 and Joe Public have disappeared



The privileges are

Privilege Code	Section	Description
can.drop.users	S001	Show the Drop User button
can.exclude.non.dba	S001	Show the Exclude non DBA's from logon check box
can.enable.application.security	S001	Show the Application security enabled check box

Application Security Enabled

If selected the privilege system is turned off. Every user then has access to everything, effectively becoming DBAs. This should never get used and SOPHTLOGIC would recommend that nobody be given this privilege.

Exclude non DBA's from logon

This option restricts access to the system to DBAs only. This should be set before an update or new release is to be rolled out.